

**Chancery Finance Office - quick reference guide**

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**Financial and Tax Reporting**

Chancery Office audited financial statements	x	x					
Diocese of Fall River financial transparency reports	x	x					
Diocesan investment accounts	x	x					
1099s issued by Chancery			x				

**Deposit and Loan Program**

Depository withdrawal requests	x	x					
New loan requests	x	x		x			
Current rates		x	x	x			
Online account access			x				
Account history, statements and current balances			x				

**Chancery invoices**

Monthly invoices (medical, dental, property, assessment, lay/clergy pension, etc...)			x				x
Miscellaneous invoices (403B, etc...)			x				

**Parish and School Support**

Parish and school budgets				x	x		
Parish annual report template				x			
Parish assessment		x		x			
Parish/school financial reviews and audits					x		
Accounting questions				x	x		
Escheated property searches				x			
Diocesan schools scholarship endowment				x		x	
Group purchasing opportunities (energy supply, phone, internet)				x			

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SOLAR opportunities				x			
Proof of 510(c)3 status		x		x			
Quickbooks questions				x	x		
1099/tax reporting procedures for parishes and schools				x	x		
<b>Central staff support</b>							
Expense reports (central staff only)			x				x
Check requests (central staff only)							x
Catholic Schools Office - banking/wires						x	
W-9s for vendors			x				x
<b>Committee Support</b>							
Diocesan Finance Council	x	x					
Diocesan Audit Committee	x	x					
Diocesan Investment Committee	x	x					
Diocesan Real Estate Committee	x	x					
<b>Other</b>							
Second collections			x				x
Gifts of stock	Please call contact Christine Duggan at the Catholic Foundation Cduggan@catholicfoundationsema.org						
Sale or lease of properties	Please call contact Paul Brooks (Director of Facilities and Real Estate) at Pbrooks@dioc-fr.org						
Construction or renovation projects	Please call contact Paul Brooks (Director of Facilities and Real Estate) at Pbrooks@dioc-fr.org						